

Statement of Work on LC Retirement Planning Seminars

I. Background

The Library of Congress seeks to provide retirement informational seminars open to staff members and a limited number of guests (e.g. spouses). Eligible staff members will be within five years of retirement. The seminars shall accommodate at least 35 attendees in a classroom setting with a combination of lecture and interactive question format.

II. General Requirements

Three day seminar provided onsite at the Library of Congress, by a variety of presenters who are experienced subject matter experts on issues as applicable to workers in the federal workforce. Seminar must present material in six instructional modules (allowing for two 20 minute breaks and a one hour lunch period):

III. Specific Requirements

A. Description of required presenter qualifications of presenters:

1. In-depth, documented knowledge of subject area as applicable to each section
2. Professional certifications as stipulated below
3. Ability to provide lecture style presentations to large audience of participants
4. Ability to interact with a diverse population of federal employees
5. Ability to answer substantive technical questions in a detailed, understandable manner

B. Description of Materials:

1. Participant manual: Three Ring Binder; Course outline; Course Objectives
2. Handouts: Salient articles; Print copies of audiovisual materials; Illustrative graphs
3. Worksheets: Self analysis surveys; Checklists of Action Items; Financial Calculators

IV. Deliverables

A. Six modules as follows:

Module 1 - Financial Planning: At least four hours provided by a certified financial planner with at least five years of experience advising employees in the federal workforce. Includes: Setting obtainable goals; determining current financial status; budgeting for retirement; developing an action plan for keeping income and expenses in balance; insurance needs; investments; assessments; tax liabilities; planning tax strategies.

Module 2 - Transition Planning: At least three hours provided by documented expert in

the area of retirement planning for employees in the federal workforce. Includes: Assessing readiness for retirement; perspectives and options for retirement planning; psycho-social adjustments; needs/wants assessment; identifying skills and abilities; choosing part time or full time work and/or volunteer activities; time management as a retiree; turf problems for spouses; creating a fresh personal identity.

Module 3 - Legal Issues: At least three hours of instruction on wills, trusts and estate planning provided by an attorney specializing in these areas as applicable to employees in the federal workforce. Includes: In-depth discussions of inheritance taxes, ownership of property, powers of attorney, etc.

Module 4 - Healthy Living: At least two hours of instruction on mental, physical and emotional aspects of retirement life by a qualified health care expert. Includes: Diet and nutrition self assessment, information and referral; Physical fitness and exercise; stress management; physical process of aging; behavior modification.

Module 5 - Federal Retirement Benefits: At least three hours of instruction on FERS/CSRS Benefits provided by an expert in these programs. Includes: eligibility for retirements; calculating benefits; survivor benefits; disability benefits; medical coverage; life insurance; thrift savings plans; playing lotteries and casinos; choosing a retirement date; steps to take now.

Module 6 - Social Security and Medicare Issues At least three hours of instruction on Social Security Benefits provided by an expert in these programs. Include: eligibility - how to qualify; understanding the Personal Benefits Statement; computation of benefits; “windfall elimination provision;” benefits for family members; government pension offset provisions; medicare eligibility and costs; the distinction between parts A and B of medicare.

B. Description of Materials: Selected vendor shall provide to seminar participants, the following materials at the start of the seminar:

1. Participant manual: Three Ring Binder; Course outline; Course Objectives
2. Handouts: Salient articles for each module; Print copies of audiovisual materials; Illustrative graphs
3. Worksheets: Self analysis questionnaires; Checklists of Action Items; Calculators for sections

C. Description of required presenter qualifications of presenters:

1. In-depth, documented knowledge of subject area as applicable to each section
2. Professional certifications as stipulated below
3. Ability to provide lecture style presentations to large audience of participants
4. Ability to interact with a diverse population of federal employees
5. Ability to answer substantive technical questions in a detailed, understandable manner

V. Reporting Requirements

None.

VI. Delivery Schedule

Monthly three day seminars (at least ten months per fiscal year).

VII. Evaluation Criteria

A. Contractor selection will be made after an evaluation of proposals and responses. An award will be made to that vendor whose combination of technical and price proposals represent the best value to the Government and are within the available Library of Congress resources.

B. Vendors are reminded that unsupported promises to comply with the requirements will not be sufficient. Proposals must not merely parrot back the specifications, but rather must provide convincing documentary evidence in support of any concluding statements relating to promised performance.

C. Cost evaluation will include analysis of the total cost and cost elements (if applicable) to perform the required work. The total cost supplied by the vendor will constitute the total firm-fixed unit price for that service or deliverable.

D. Proposals that are unrealistic as to technical commitment or unreasonably low or high in cost or price will be deemed reflective of an inherent lack of technical competence or indicative of failure to comprehend the complexity and risk involved in the requirements and may be grounds for rejection of the proposal.

E. Technical proposals will be evaluated with respect to five (5) criteria. The technical proposal is worth more than the cost proposal; however, in the event that technical proposals are relatively equal in technical merit, cost may increase in importance.

VIII Evaluation Factors

A. Five evaluation factors are:

1. Level of experience in providing information to employees in the federal workforce
2. Knowledge of key areas listed in modules (certifications where specified)
3. Ability to meet all schedule requirements
4. Ability to provide a qualified substitute in the absence of a scheduled speaker
5. Costs: fair and reasonable

B. Evaluation will only be considered for complete packages:

1. Proposal
2. Sample course outline and materials
3. Documentation of presenters qualifications
4. Cost Proposal

IX. Note: Parking is an important consideration for contractors. The Capitol Hill area offers only limited parking options. The Capitol South metro stop is a convenient option. Only one Library parking pass is provided on each day of seminar.